

# **USDA Weekly Retail Turkey Feature Activity**

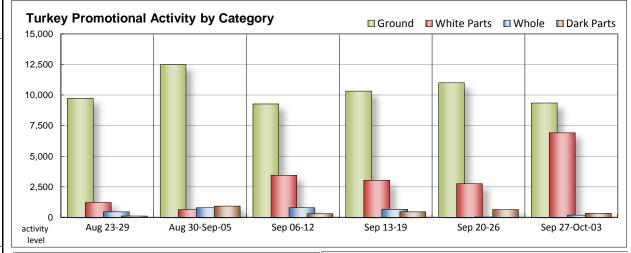
Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/27 thru 10/03.

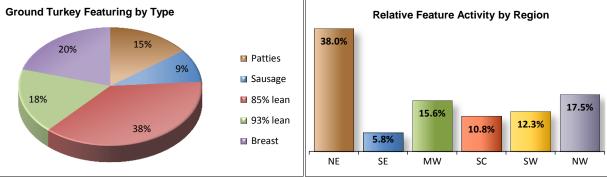
(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

(prices in dollars per pound fresh unless otherwise noted;												
NATIONAL SUMMARY												
	THIS	WEEK	LAST	WEEK	LAST YEAR							
Feature Rate 1/	42.2%	of 23,200	44.8%	of 23,200	35.9% of 22,500							
i catule itale	ou	tlets	ou	tlets	outlets							
Special Rate 4/	0.	.9%	1.	.1%	0.0%							
Activity Index 2/		,850	16	,540	12	,900						
3/	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg						
WHOLE BIRDS:												
Fresh - Hens	80											
" - Toms	70											
Frozen - Hens	20	_	40	1.29	160	1.18						
" - Toms	20	1.19			160	1.18						
PARTS:												
Breast:												
Bone-in, whole												
Fresh			70	2.94	10	3.29						
Frozen	4,110	1.92	1,330	2.05	1,090	1.85						
Split, bone-in												
Fresh			10	2.69								
Rotisserie	670	8.21	660	7.74	210	7.78						
Boneless, whole	10	4.99	20	4.49	60	5.59						
Cutlets	1,300	4.56	310	5.08	150	5.02						
Cutlets, thin sliced	180	4.99			100	4.99						
Strips												
Tenders	640	4.32	360	4.93	630	4.46						
Marinated Tenders	70	4.39	290	4.43	810	4.24						
Drumsticks	90	1.71	70	1.90	20	1.79						
Thighs	80	1.73			10	1.98						
Wings	20	1.97	80	1.98	20	1.99						
Necks					10	1.59						
Smoked Drumsticks	40	1.89	180	2.20	160	1.94						
Smoked Wings	60	1.83	180	2.00	160	1.77						
Smoked Necks	40	1.89	140	1.82	140	1.69						
GROUND TURKEY:	9,350	3.57	11,000	3.25	7,850	3.43						
Patties	1,380	3.58	720	3.44	820	3.59						
Sausage	850	3.44	1,230	3.43	1,000	3.18						
85% lean	3,540	3.04	2,790	2.80	1,070	2.47						
93% lean	1,670	3.20	4,420	3.00	2,530							
Breast	1,910	4.84	1,840	4.60	2,430	4.49						
Rolls (frsh/frz 1 lb.)	610	2.88	1,000	2.48	370	2.68						
Specialty 5/												
Patties	50	4.29	20	4.25	40	3.99						
93-94% lean	1,290	4.06	110	3.32	480	4.48						
Breast	50	5.85	670	5.51	260	7.21						
Note: rolls & specialty no	ot included	d in ground	turkey tota	al and weigl	hted avera	age.						

This Week's Turkey Feature Highlights

Retail feature activity increases heading into the first of the month. Featuring is light on fresh and frozen whole turkeys; it will be a few more weeks before grocers start focusing more on Thanksgiving menus. That said there is very active featuring on frozen bone-in turkey; prices trend lower this week. Offerings on rotisserie breasts increase slightly on volume; prices are quite a bit higher. More stores are promoting boneless white parts, especially cutlets at lower prices. Offerings decrease on dark parts; prices are mostly lower. Ground turkey featuring slows but there are still plenty of promotions to chose from; prices are higher on all types of ground turkey. The 85% lean gets the most space in this week's circulars. Specialty 93-94% ground is frequently featured in this week's ads. Deli promotions decrease on full service and self-service deli meats. Service deli offerings increase on private and processor brand thin slicing meats. Stores promote more of their self-service private brands.





All report information gathered from publicly available sources including store circulars, newspaper ads, and retailer websites.

1/ Feature Rate: the amount of sampled stores advertising <u>any</u> reported turkey item during the current week, expressed as a percentage of the total sample. 2/ Activity Index: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised turkey item (e.g., a retailer with 100 outlets featuring 3 turkey items has an activity index of 300). 3/ Stores/Avg: the total number of advertising outlets and the weighted average price weighted by the respective number of outlets. 4/ Special Rate: the percentage of sampled stores with a no-price promotion (e.g., buy 1, get 1 free, etc.) 5/ Specialty: products produced from birds raised on an all vegetable diet without antibiotics and minimally processed.



Fri. Sep 27, 2013

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	NORTH	HEAST U.S.		SOUT	THEAST U.S.		MIDWEST U.S.  (IA,IL,IN,KY,MI,MN,ND,NE,OH,SD,WI)  47.5% of 4,200 sampled outlets  4.8% of stores w/ no-price promotions  Activity Index = 3,240  Price Range Summary			
	(CT,DE,MA,MD,M	E,NH,NJ,NY,PA,F	RI,VT)	(AL,FL,GA,M	S,NC,SC,TN,VA,V	VV)				
Feature Rate 1/	65.3% of 4,60	0 sampled outle	ts	15.7% of 6,	100 sampled outle	ets				
Special Rate 4/	0.0% of stores w	•		1	w/ no-price prom					
Activity Index 2/		Index = 8,650			y Index = 1,790					
Tioning mask	Price Range	Summar	V	Price Range	Summa	rv				
	(\$/pound)		Vtd Avg	(\$/pound)		Wtd Avg	(\$/pound)		Wtd Avg	
WHOLE BIRDS:										
Fresh - Hens	1.49	10	1.49							
" - Toms	1.10		1.10							
Frozen - Hens							1.19	20	1.19	
" - Toms							1.19	20	1.19	
PARTS:										
Breast:										
Bone-in, whole										
Fresh										
Frozen	0.99 - 1.99	1,300	1.90	1.49 - 1.99	590	1.96	1.29 - 1.99	1,040	1.89	
Split, bone-in										
Fresh										
Rotisserie	5.99 - 8.99	210	6.48				6.99 - 9.99	230	9.39	
Boneless, whole	4.99	10	4.99							
Cutlets	3.99 - 5.99	1,080	4.49	3.99	70	3.99	4.99 - 5.45	80	5.09	
Cutlets, thin sliced	4.99	180	4.99							
Strips										
Tenders	3.99 - 5.49	430	4.06				4.49 - 4.99	140	4.75	
Marinated Tenders										
Drumsticks	1.59 - 1.69	80	1.68							
Thighs	1.69	70	1.69							
Wings	1.59 - 2.49	20	1.97							
Necks										
Smoked Drumsticks	1.99	20	1.99	1.79	20	1.79				
Smoked Wings	1.99	20	1.99	1.69 - 1.79	30	1.76	1.69	10	1.69	
Smoked Necks	1.99	20	1.99	1.79	20	1.79				
GROUND TURKEY:										
Patties	2.99 - 4.99	1,230	3.61	2.99 - 3.50	80	3.11	3.49 - 3.50	30	3.49	
Sausage	2.49 - 4.09	450	3.55				2.86 - 3.49	290	3.31	
85% lean	1.99 - 3.00	670	2.64	1.79 - 3.29	660	2.59	1.99 - 3.50	760	3.01	
93% lean	1.92 - 3.59	660	3.00	1.92 - 2.99	70	2.40	2.48 - 3.50	340	3.16	
Breast (99-100% lean)	4.61 - 6.15	1,300	5.09	3.99 - 4.61	110	4.35	3.23 - 3.99	80	3.89	
Rolls (frsh/frz 1 lb.)				2.79	70	2.79	2.99	170	2.99	
Specialty 5/										
Patties	3.99	40	3.99							
93-94% lean	2.99 - 5.99	820	3.74	3.50	70	3.50	3.99	10	3.99	
Breast	5.00 - 6.99	30	5.75				5.99	20	5.99	



# **USDA Weekly Retail Turkey Feature Activity**

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Advertised Prices for Turkey to Consumers at Major Retail Supermarket Outlets during the period of 09/27 thru 10/03.

(prices in dollars per pound fresh unless otherwise noted; does not reflect all turkey items available in the marketplace)

Feature Rate <sup>1/</sup> Special Rate <sup>4/</sup> Activity Index <sup>2/</sup>	SOUTH	CENTRAL U.S.		SOUT	HWEST U.S.	NORTHWEST U.S. (AK,ID,MT,OR,WA,WY)				
	(AR,AZ,CO,KS	,LA,MO,NM,OK,TX	"UT)	((	CA,HI,NV)					
	35.8% of 4,2 0.0% of stores v Activity	00 sampled outle w/ no-price promo / Index = 2,240	ts tions	52.6% of 2,9 0.0% of stores Activit	000 sampled outle w/ no-price promo y Index = 1,840	otions	64.9% of 1,200 sampled outlets 0.0% of stores w/ no-price promotions Activity Index = 1,090			
	Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		Price Range (\$/pound)	Summary Stores Wtd Avg		
WHOLE BIRDS:										
Fresh - Hens " - Toms Frozen - Hens " - Toms							1.79 1.79	70 70	1.79 1.79	
PARTS:										
Breast: Bone-in, whole Fresh										
Frozen Split, bone-in Fresh	1.69 - 1.89	750	1.97	1.90 - 1.99	410	1.96	1.59 - 1.99	20	1.85	
Rotisserie				8.99	130	8.99	5.99 - 8.99	100	8.12	
Boneless, whole										
Cutlets	5.72	40	5.72				5.72	30	5.72	
Cutlets, thin sliced										
Strips										
Tenders	5.03	40	5.03				5.03	30	5.03	
Marinated Tenders	4.39	50	4.39				4.39	20	4.39	
Drumsticks							1.98	10	1.98	
Thighs							1.98	10	1.98	
Wings										
Necks										
Smoked Drumsticks										
Smoked Wings										
Smoked Necks										
GROUND TURKEY: Patties	3.50	30	3.50	4.39	10	4.39				
Sausage	3.50	30	3.30	3.27 - 3.60	30	4.39 3.45	3.27	80	3.27	
85% lean	2.79 - 3.50	550	3.39	3.27 - 3.60	550	3.50	2.79 - 3.50	350	3.45	
93% lean	2.49 - 3.99	180	3.48	3.19 - 3.99	210	3.91	2.79 - 3.50 3.19	210	3.43	
Breast (99-100% lean)	3.99 - 4.99	260	4.58	3.19 - 3.99	70	3.99	3.99 - 4.39	90	4.06	
Rolls (frsh/frz 1 lb.)	1.99 - 2.99	200	2.71	2.99	170	2.99	0.00 7.00	30	7.00	
Specialty 5/	1.00 2.00	200		2.00	170	2.00				
Patties				5.49	10	5.49				
93-94% lean	3.69	140	3.69	5.49	250	5.49				
Breast	0.00		2.00	3		2				



## **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Fri. Sep 27, 2013

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/27 thru 10/03.

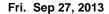
(prices in dollars per pound unless otherwise noted; does not reflect all poultry items available in the marketplace)

	N	ATIONAL	SUMMAR	RY			NORTHEAST U.S.		SOUTHEAST U.S.						
	This	Week	Last	Week	Last	Year	(CT,DE,MA,MD,ME,NH,NJ,NY,PA,RI,VT)			(AL,FL,GA,MS,NC,SC,TN,VA,WV)					
5	71.5% o	f 23,200	79.3% o	f 23,200	65.5% o	f 22,500									
Feature Rate 1/	sto	res	sto	res	sto	res	83.4% of 4,600 sampled outlets			74.2% of 6,100 sampled outlets					
Activity Index 2/	48,	030	54	240	45	020			Activity Ind	ex = 13,420	)	Activity Index = 13,070			
Activity index 2/	40,	930	54,	240	43,	020		Price	Range	Sum	mary	Price	Price Range Summary		mary
	Stores	Wtd Avg	Stores	Wtd Avg	Stores	Wtd Avg		(\$/pc	ound)	Stores	Wtd Avg	(\$/pound)		Stores	Wtd Avg
SERVICE DELI - Turkey															
Category 1															
Processor Brand	4,830	8.15	5,630	8.09	-, -	7.78			- 12.99	3,040		6.29	- 8.99	690	8.09
Private Brand	1,270	7.53	2,030	7.93	3,030	6.98		6.99	- 7.99	1,070	7.43		7.49	70	7.49
Category 2															
Processor Brand	5,810	5.95	3,960	5.89	4,130	5.76			7.99	1,840			- 6.99	750	6.35
Private Brand	4,320	7.37	3,800	6.69	2,140	5.90		4.99 -	6.99	1,530	6.87	4.99	- 8.59	570	8.11
Category 3															
Processor Brand	890	4.21	2,030	4.09	680	3.80			3.99	10		3.99		530	4.04
Private Brand	1,390	4.89	1,240	5.31	1,500	5.46		3.48 -	4.99	170	4.50		4.99	1,150	4.99
Turkey Ham															
Processor Brand	440	3.79	270	3.26	550	4.02		3.49 -	5.77	260	4.17		3.99	40	3.99
Private Brand			10	3.99											
Turkey Pastrami															
Processor Brand	170	4.50	440	3.83	660	4.54		3.79 -	4.99	60	4.11				
Private Brand															
SERVICE DELI - Chicken															
Category 1															
Processor Brand	1,570	7.24	3,950	7.90	3,020	7.77		5.99	- 9.99	500	7.95		5.99	50	5.99
Private Brand	560	7.77	2,240	7.67	1,430	7.10		6.99	- 7.99	530	7.80				
Category 2															
Processor Brand	330	5.61	110	5.04	140	4.87			5.99	10	5.99				
Private Brand			630	5.98	10	4.94									
SELF-SERVICE DELI															
(dollars per tub or pouch)															
Turkey 7-10 oz															
Processor Brand	8,570	2.70	11,150	2.92	6,680	3.14		1.99 -	3.79	1,990	3.10		- 3.33	2,510	2.79
Private Brand	3,740	2.85	1,600	3.05	2,570	3.04			2.99	170	2.99	2.50	- 3.50	1,590	3.25
Turkey 16 oz															
Processor Brand	2,950	5.02	2,750	4.92	1,770	4.27		3.99 -	5.99	120	4.73		4.99	1,050	4.99
Private Brand															
Chicken 7-10 oz					_						_				_
Processor Brand	8,480	2.67	10,800	2.93		3.18		1.99 -		1,950		1.99		2,490	2.78
Private Brand	3,610	2.85	1,600	3.05	2,480	3.04			2.99	170	2.99	2.50	- 3.50	1,580	3.25

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)





### **USDA Weekly Retail Turkey Feature Activity - Poultry Deli Meats**

Advertised Prices for Poultry Deli Meats to Consumers at Major Retail Supermarket Outlets during the period of 09/27 thru 10/03.

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	MIDW	EST U.S.	SOUTH C	ENTRAL U.S.	SOUTHW	EST U.S.	NORTHWEST U.S.				
	(IA,IL,IN,KY,MI,MI	N,ND,NE,OH,SD,WI)	(AR,AZ,CO,KS,LA	A,MO,NM,OK,TX,UT)	(CA,F	II,NV)	(AK,ID,MT,	OR,WA,WY)			
Feature Rate 1/											
		67.2% of 4,200 sampled outlets 62.8% of 2,900 sampled outlets 62.8% of 2,900 sampled outlets Activity Index = 8,500 Activity Index = 8,060 Activity Index = 4,310				•	ets 70.5% of 1,200 sampled outlets  Activity Index = 1,570				
Activity Index 2/	Activity Index = 8,500  Price Range Summary		Price Range	ndex = 8,060 Summary	Price Range	Summary	Price Range Summary				
	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound)	Stores Wtd Avg	(\$/pound) Stores Wtd Avg				
SERVICE DELI - Turkey	(φ,ροαα)	Cto.co maring	(φ/ρσαα)	Ctores maring	(4, p = a a)	Oldred IIIa/lig	(φ, ροαιια)	Clored Triaring			
Category 1											
Processor Brand	6.95 - 10.99	610 7.22	6.99 - 10.49	220 7.53	7.99 - 10.99	260 8.92	8.99	10 8.99			
Private Brand	7.99 - 10.99	80 8.65	7.99	50 7.99							
Category 2											
Processor Brand	4.95 - 6.99	1,160 6.20	4.39 - 5.89	1,420 5.55	4.99 - 6.99	460 5.31	4.99 - 6.99	180 5.48			
Private Brand	4.99 - 8.59	700 7.55	4.99 - 7.99	1,140 7.06	7.99 - 8.99	300 8.86	7.99 - 8.99	80 8.81			
Category 3											
Processor Brand	3.99 - 4.99	310 4.55			2.99 - 3.99	30 3.77	3.98	10 3.98			
Private Brand	3.98 - 4.99	70 4.14									
Turkey Ham											
Processor Brand	2.99 - 3.88	20 3.53	2.69 - 3.19	20 2.90	2.69 - 3.29	100 2.95					
Private Brand											
Turkey Pastrami											
Processor Brand	3.88	10 3.88	4.99	90 4.99			2.99	10 2.99			
Private Brand											
SERVICE DELI - Chicken											
Category 1											
Processor Brand	5.49 - 8.99	570 6.85	5.99 - 8.99	260 6.73			6.99 - 11.99	190 7.57			
Private Brand	5.98 - 7.99	30 7.15									
Category 2											
Processor Brand	4.49 - 5.99	230 5.85	4.69 - 4.99	30 4.87	5.00	20 5.00	5.00	40 5.00			
Private Brand											
SELF-SERVICE DELI											
(dollars per tub or pouch)											
Turkey 7-10 oz											
Processor Brand	1.99 - 3.78	1,300 2.64	1.98 - 2.19	1,550 2.53	1.99 - 2.59	800 2.12	1.99 - 3.19	420 2.19			
Private Brand	2.50 - 3.69	820 2.75	1.99 - 2.99	670 2.33	1.99 - 2.50	410 2.45	1.99	80 1.99			
Turkey 16 oz											
Processor Brand	3.49 - 5.49	590 4.82	3.99 - 4.99	420 4.70	4.99 - 6.99	720 5.50	3.99 - 4.99	50 4.49			
Private Brand											
Chicken 7-10 oz	4.00 5.75	4.000	1.00 5.15	4.500			4.00	400 5 1 -			
Processor Brand	1.99 - 3.78	1,300 2.64	1.98 - 2.19	1,520 2.53	1.19 - 2.59	800 1.85	1.99 - 3.19	420 2.19			
Private Brand	2.50 - 3.69	700 2.74	1.99 - 2.99	670 2.33	1.99 - 2.50	410 2.45	1.99	80 1.99			

Category 1: composed of 1-3 whole breast lobes using no binders. (slicing)

Category 2: composed of multiple (5-7) whole or partial breast muscles; sectioned and formed with minimal binders. (thin slicing)

Category 3: composed of multiple muscle pieces chopped and reformed into desired shape. (shaving)